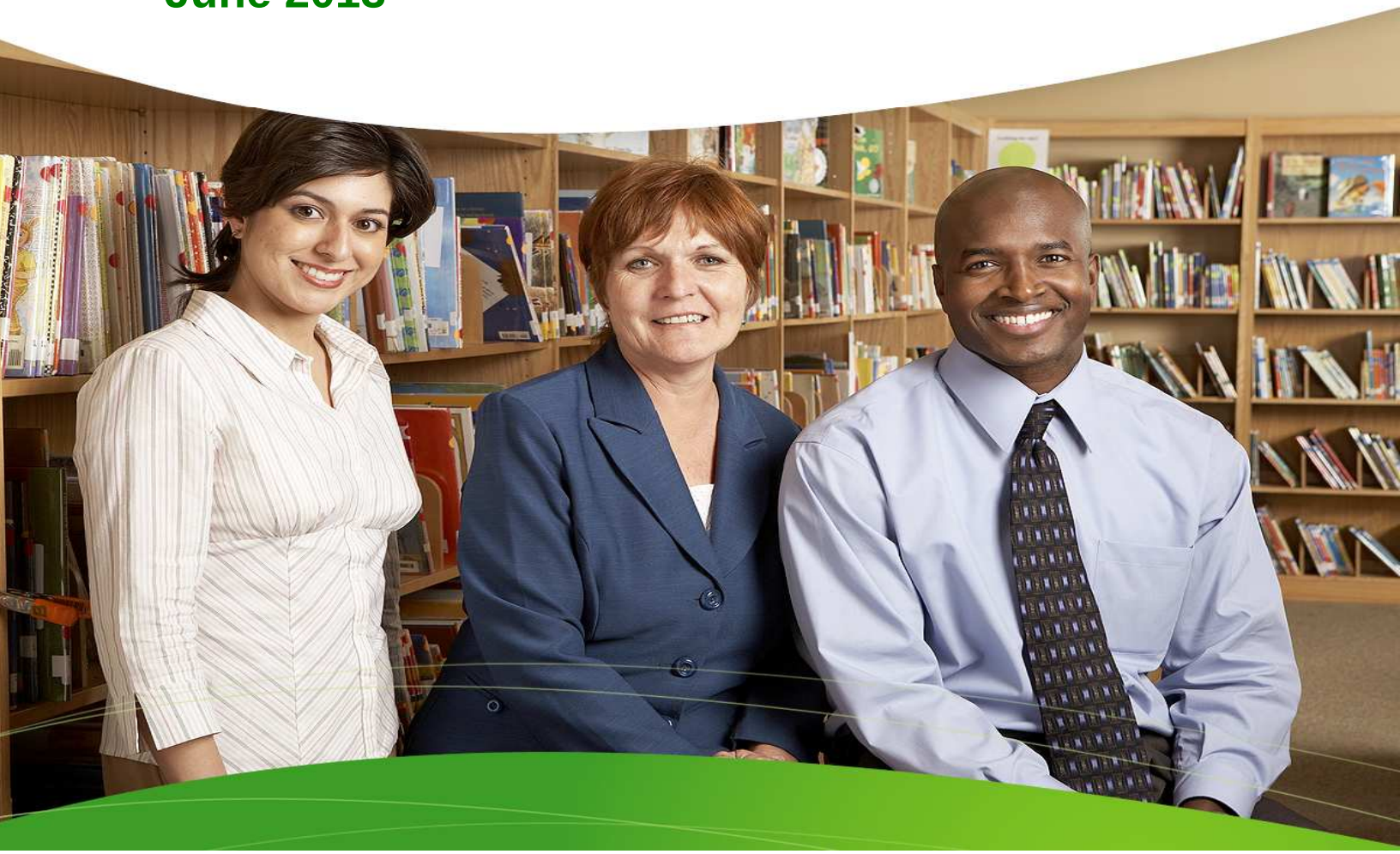
SmartFindExpress

Administrator User Guide

Version 2.3

June 2013



STATEMENT OF CONFIDENTIALITY

This information has been prepared for the express purpose of providing your organization with information about the functions and use of the eSchool Solutions SmartFind*Express* system. This material contains proprietary product information and may not be reproduced, used by, or disclosed to persons not in the employ of the recipient without the prior written consent of eSchool Solutions. **Company Confidential/Do Not Distribute – Do Not Post on Unsecured Web Sites (such as your district web site).**

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***NOTE:* Refer to the *System Administrator User Guide* for more detailed information on all of the Administrator features in the system.**

Logging into SmartFindExpress

1. Open your Internet browser and access the SmartFind*Express* site. The system Welcome message and any district-wide announcements are displayed.

2. Two identifiers are required to log in to the system: User ID and Password. Click *Submit* to access the system.

3. If you have forgotten your password, click the **'Trouble signing in?'** link.

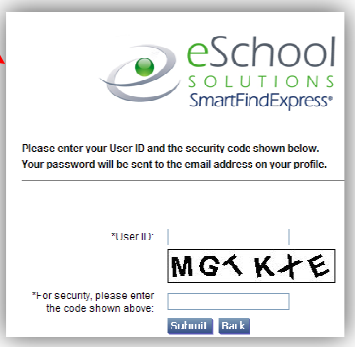
4. Follow the instructions on the screen and then click Submit. Your password will be sent to the email address on your profile.

5. Upon successful login, your home page is displayed. From your home page, you can manage your personal information and perform a variety of administrative tasks.

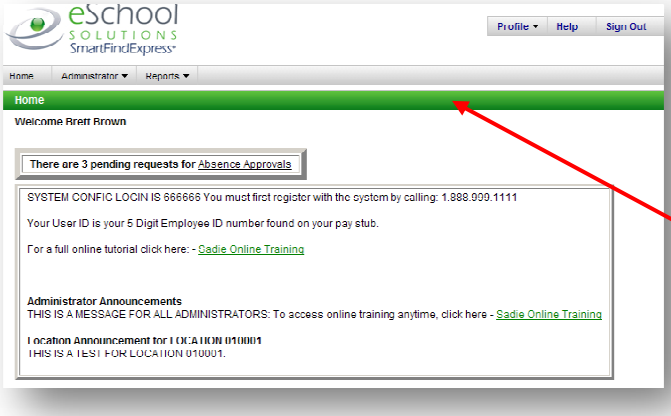
District-wide Announcements

eSchool SOLUTIONS SmartFindExpress
SmartFindExpress system has a new phone number to use for call-in. Please update your phone list.
SmartFindExpress new number is 425-320-1337
Beginning October first employees who call the 888 number will hear this number has been changed message and will be reminded of the new telephone number.
User ID
Password
Submit
Trouble signing in?
SmartFindExpress Mobile
Easy and Convenient access from the palm of your hand

Enter User ID and Password


eSchool SOLUTIONS SmartFindExpress
Please enter your User ID and the security code shown below.
Your password will be sent to the email address on your profile.
*User ID:
MG1 K4E
*For security, please enter the code shown above:
Submit
Back

1. Enter User ID
2. Enter Security Code
3. Click Submit

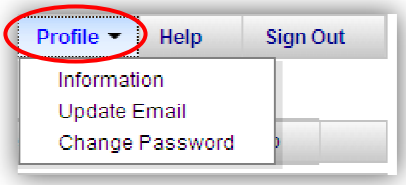

eSchool SOLUTIONS SmartFindExpress
Profile
Help
Sign Out
Home
Administrator
Reports
Home
Welcome Brett Brown
There are 3 pending requests for Absence Approvals
SYSTEM CONFIC LOCIN IS 666666 You must first register with the system by calling: 1.888.999.1111
Your User ID is your 5 Digit Employee ID number found on your pay stub.
For a full online tutorial click here: - Sadie Online Training
Administrator Announcements
THIS IS A MESSAGE FOR ALL ADMINISTRATORS: To access online training anytime, click here - Sadie Online Training
Location Announcement for LOCATION 010001
THIS IS A TEST FOR LOCATION 010001.

From your Home Page you can:

- ✓ **Modify Profile Information**
- ✓ **Get Help While You Work**
- ✓ **Perform Administrative tasks**
- ✓ **Create, access and run reports**

Managing Profile Information

The **Profile** feature lets you view profile information, update your email address and change your passwords.



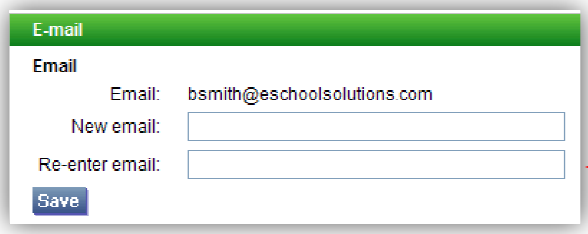
View Profile Information

Your current status in the system and your address in the system are shown. Contact your system administrator with any changes.

Update Your Email Address

Type in your new email address and click Save.

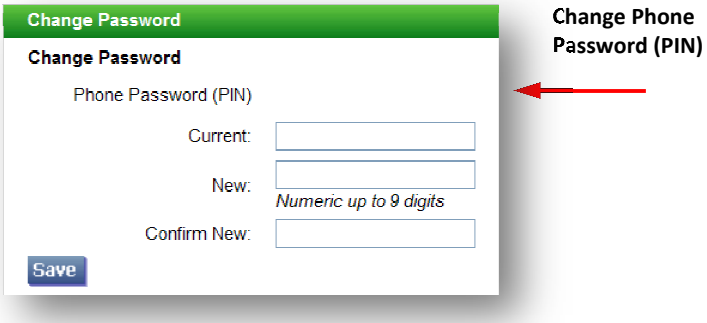
The system automatically sends Job Creation and Job Cancellation emails (if your district uses this feature). For more information, contact your System Operator.



Change Password

Enter your current password and the new password. You can enter up to 9 digits. Click Save.

Note: *If your district is configured to use Web Passwords, the Change Password feature will include an option to change the Web password.*



Help

Getting Help While You Work

Click the Help tab to access Help guides and How-to videos.

Sign Out

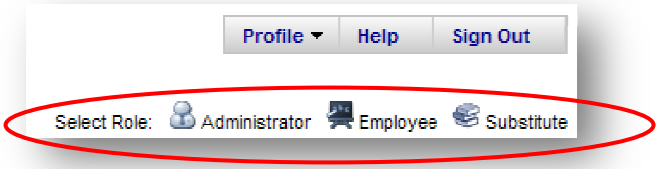
Exiting the System

Click the Sign Out tab to exit the system.

Select Role

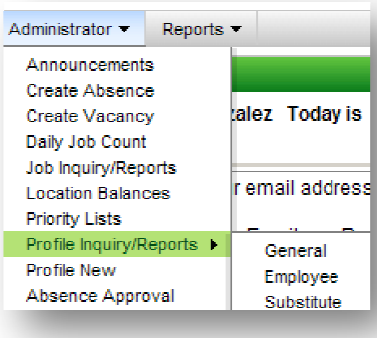
Change User Role

For multi-role administrators, the system lets you automatically switch between profiles to complete tasks. No need to log out of the system and back in again!



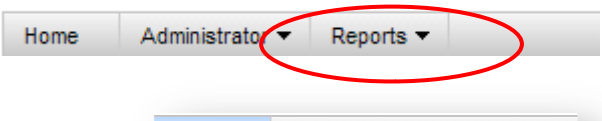
Administrator Menu

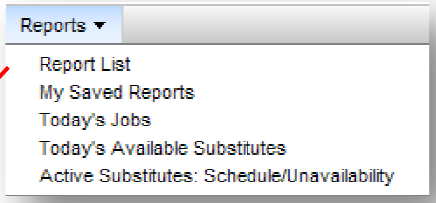
The Administrator menu enables you to perform a variety of tasks from creating announcements, absences and vacancies to performing job and profile inquires, obtaining daily job counts, maintaining priority lists, and working with absence approval requests.

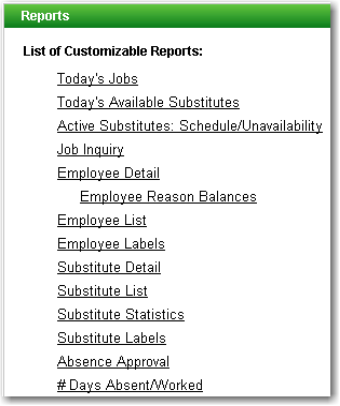


Reports Menu

The Reports menu enables you to quickly create a variety of job, employee and substitute reports for your location(s), save report settings for re-use, schedule reports and instantly generate job and substitute reports for the current day for your location.





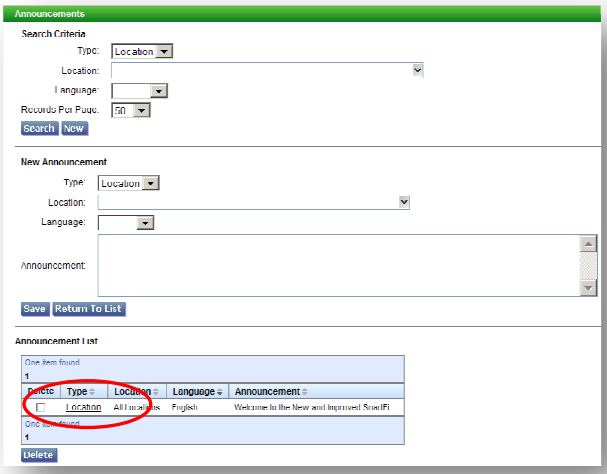


Announcements

1. Click on **Announcements** from the Administrator menu.

2. Click New to display the New Announcement form. Select the announcement type, location and language and type in the announcement text.

Carriage returns can be used when entering the text to start a new line. HTML tags can be used to create bold. underline and italics text.



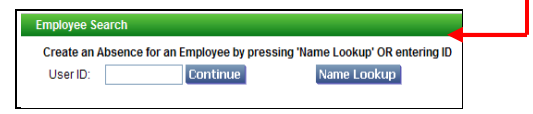
3. To modify an announcement, click on the Location link from the Announcement List to display the Modify Announcement screen.

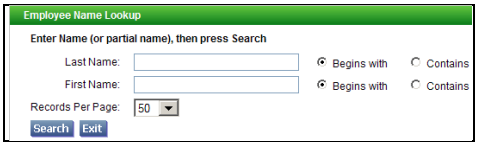
4. To delete an announcement, click in the Delete box next to the announcement and then click the Delete button.

Create Absence

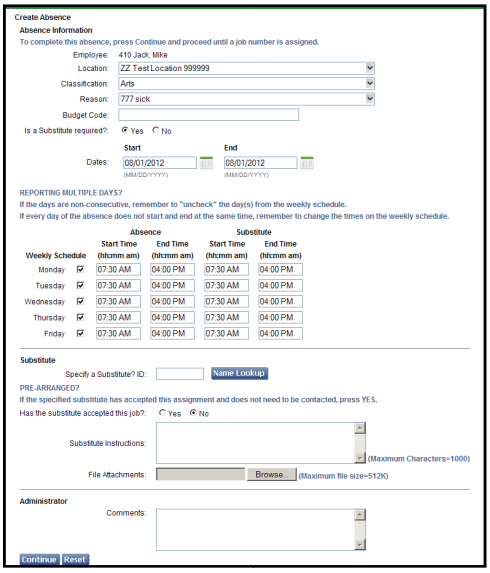
1. Click on **Create Absence** from the Administrator menu.

2. Enter the employee's Access ID or click *Name Lookup* to search for the employee by name.





3. The employee's primary location is shown. To select a different location, use the drop-down menu.



4. Select a reason for the absence. If the reason for the absence requires absence approval, an Approval Comment box is displayed. Add any special notes on the absence request.

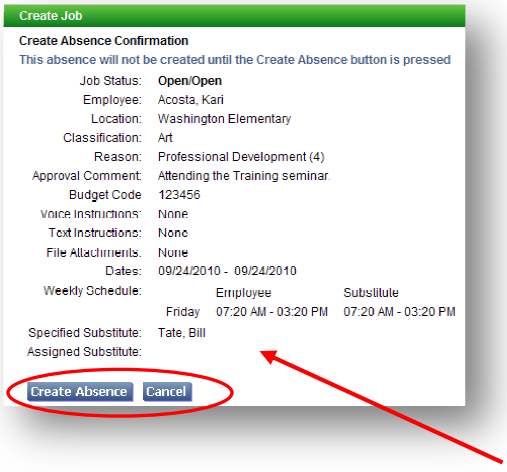
5. Enter a budget code if one is required for the reason.

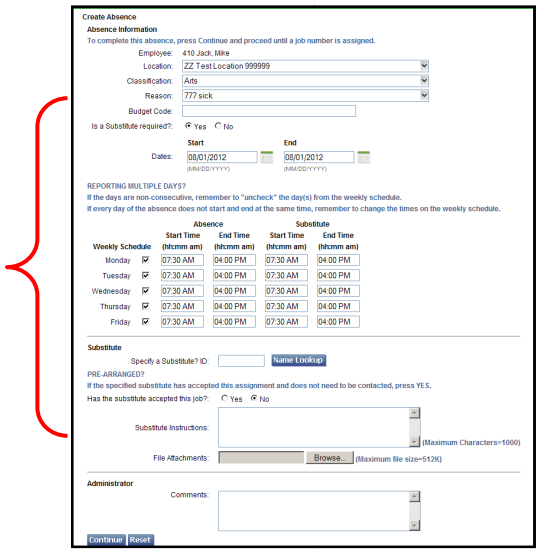
6. Change the default value of Yes to No if a substitute is not required for the absence.

7. Enter the dates for the absence if different from today's date.

8. The employee's weekly schedule is displayed. Make any modifications to the schedule times and/or days. Uncheck days that do not apply to the absence. Multiple-day jobs can have different start and end times. To change the times and/or AM/PM value, select the field and use the up/down arrows on your keyboard to make any changes.

9. To specify a substitute, enter the Substitute ID or click Name Lookup to find the substitute name.


Create Job
Create Absence Confirmation
This absence will not be created until the Create Absence button is pressed
Job Status: Open/Open
Employee: Acosta, Kari
Location: Washington Elementary
Classification: Art
Reason: Professional Development (4)
Approval Comment: Attending the Training seminar.
Budget Code 123456
Voice Instructions: None
Text Instructions: None
File Attachments: None
Dates: 09/24/2010 - 09/24/2010
Weekly Schedule: Employee Substitute
Friday 07:20 AM - 03:20 PM 07:20 AM - 03:20 PM
Specified Substitute: Tate, Bill
Assigned Substitute:
Create Absence
Cancel


Create Absence
Absence Information
To complete this absence, press Continue and proceed until a job number is assigned.
Employee: 410 Jack, Mike
Location: ZZ Test Location 999999
Classification: Arts
Reason: 777 sick
Budget Code:
Is a Substitute required?: Yes No
Start
End
Dates: 08/01/2012 08/01/2012
(MM/DD/YYYY)
REPORTING MULTIPLE DAYS?
If the days are non-consecutive, remember to "uncheck" the day(s) from the weekly schedule.
If every day of the absence does not start and end at the same time, remember to change the times on the weekly schedule.
Absence
Substitute
Weekly Schedule
Start Time (hh:mm am)
End Time (hh:mm am)
Start Time (hh:mm am)
End Time (hh:mm am)
Monday 07:30 AM 04:00 PM 07:30 AM 04:00 PM
Tuesday 07:30 AM 04:00 PM 07:30 AM 04:00 PM
Wednesday 07:30 AM 04:00 PM 07:30 AM 04:00 PM
Thursday 07:30 AM 04:00 PM 07:30 AM 04:00 PM
Friday 07:30 AM 04:00 PM 07:30 AM 04:00 PM
Substitute
Specify a Substitute? ID:
Name Lookup
PRE-ARRANGED?
If the specified substitute has accepted this assignment and does not need to be contacted, press YES.
Has the substitute accepted this job?: Yes No
Substitute Instructions:
(Maximum Characters=1000)
File Attachments:
Browse...
(Maximum file size=512K)
Administrator
Comments:
Continue
Reset

10. Click "Yes" if the substitute is known and has verbally accepted the job from the person reporting the absence. The substitute is then responsible for accessing the system and verifying that the employee did prearrange them to their absence, and obtain the job number.
Click "No" if the substitute has not accepted this assignment. Calls will be placed to the substitute to offer the job.

11. Add any instructions for the substitute. The instructions are also voiced to substitutes over the IVR.

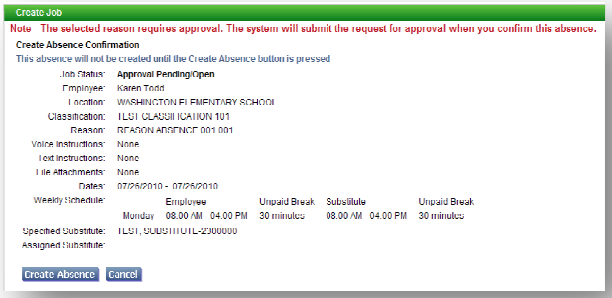
12. Attach any files to the job. Up to three attachments can be added.

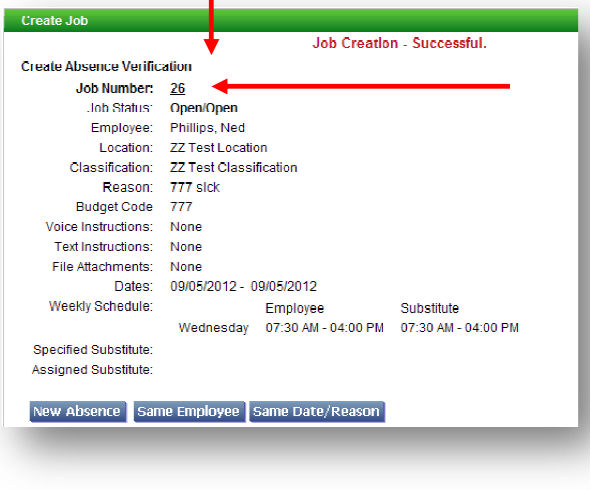
13. Add any comments on the absence.

14. Click Continue to confirm the job.

15. On the Create Absence Confirmation page, verify that the absence information is correct and then click Create Absence to create the job or Cancel to return to the Job Create form.

16. If the absence was created for a reason that requires approval, a note would display on the Create form and the job would be created with the status of Approval Pending/Open.
17. The Create Absence Verification page displays the job number for the absence.


Create Job
Note The selected reason requires approval. The system will submit the request for approval when you confirm this absence.
Create Absence Confirmation
This absence will not be created until the Create Absence button is pressed
Job Status: Approval Pending/Open
Employee: Karen Todd
Location: WASHINGTON ELEMENTARY SCHOOL
Classification: TEST CLASSIFICATION 101
Reason: REASON ABSENCE 001 001
Voice Instructions: None
Text Instructions: None
File Attachments: None
Dates: 07/26/2010 - 07/26/2010
Weekly Schedule: Employee Unpaid Break Substitute Unpaid Break
Monday 08:00 AM 04:00 PM 30 minutes 08:00 AM 04:00 PM 30 minutes
Specified Substitute: TEST, SUBSTITUTE-2300000
Assigned Substitute:
Create Absence
Cancel



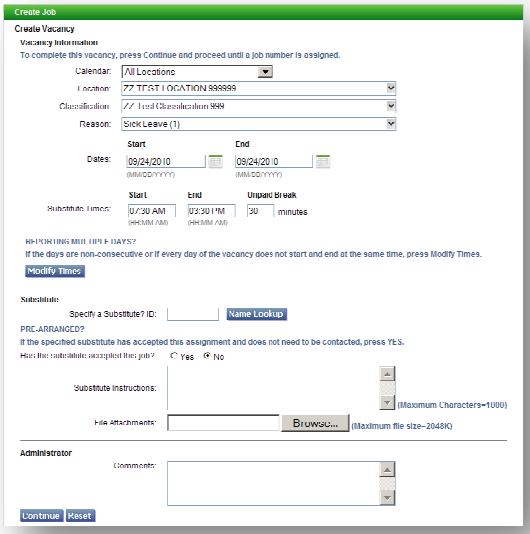
Clicking on the job number link displays the Job Inquiry page for the job number.

Create Vacancy

A vacancy is created when no employee exists to be absent and a substitute is needed.

1. Click on **Create Vacancy** from the Administrator menu.
2. Calendar is a pull-down menu of all the calendars that can apply to this vacancy. The "All Locations" calendar is the default.

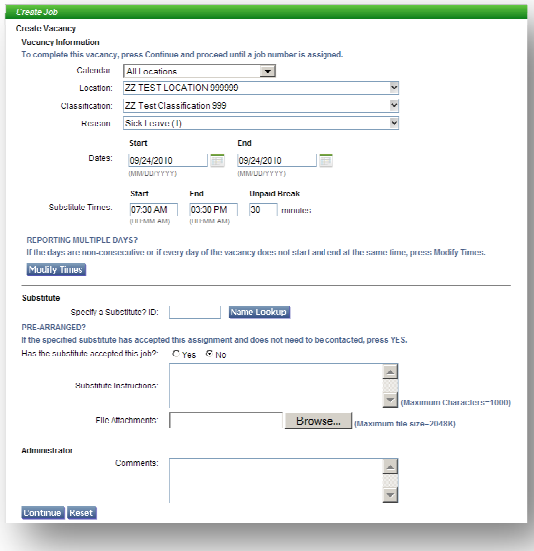
   The calendar dictates the workdays, holidays, and "No Substitute Required" days that will apply to this vacancy.
3. Location is a pull-down menu of all the locations for which this vacancy can apply. The locations that you are authorized to view will appear in the list.
4. Classification is a pull-down menu of all the classifications for which this vacancy can apply.


Create Job
Create Vacancy
Vacancy Information
To complete this vacancy, press Continue and proceed until a job number is assigned.
Calendar: All Locations
Location: ZZ TEST LOCATION 999999
Classification: ZZ Test Classification 999
Reason: Sick Leave (1)
Start End
Dates: 09/24/2010 09/24/2010
(MM/DD/YYYY) (MM/DD/YYYY)
Start End Unpaid Break
Substitute Times: 07:30 AM 03:30 PM 30 minutes
(HH:MM AM) (HH:MM AM)
If the days are non-consecutive or if every day of the vacancy does not start and end at the same time, press Modify Times.
Modify Times
Substitute
Specify a Substitute? ID:
Name Lookup
PRE-ARRANGED?
If the specified substitute has accepted this assignment and does not need to be contacted, press YES.
Has the substitute accepted this job? Yes No
Substitute Instructions:
(Maximum Characters=1000)
File Attachments:
Browse...
(Maximum file size=2048K)
Administrator
Comments:
Continue
Reset

5. The Reason pull-down menu displays absence/vacancy reason.

6. A Budget Code field may display *only* if the reason for the vacancy requires a budget code. If the reason has been set up to "collect" a budget code, you must enter a budget code to create the job.

7. The default for entry of a vacancy is today's date. To edit the dates, click the Calendar icon to display the calendar, or type in the new dates in the specified format.



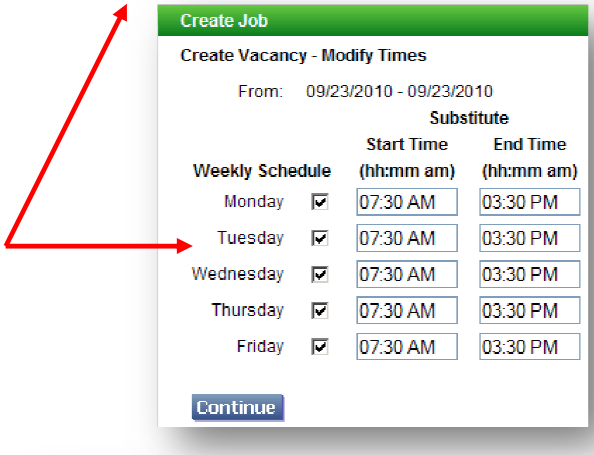
8. The Substitute Times defaults to the location times. To edit the times, all four digits of the time must be entered in hh:mm am or pm format.

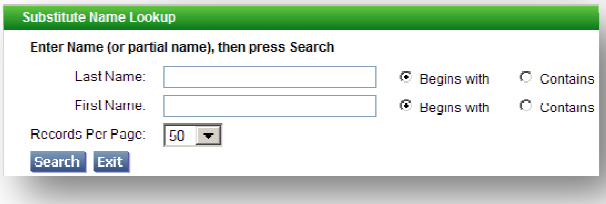
9. The amount of unpaid break time in minutes (i.e., lunch) for this Classification. Unpaid Break minutes (such as unpaid lunch breaks) can be optionally configured for Classifications.

10. Click Modify Times if the days are non-consecutive, or if each day of the vacancy has a different start/end time. The Create Vacancy - Modify Times screen displays.

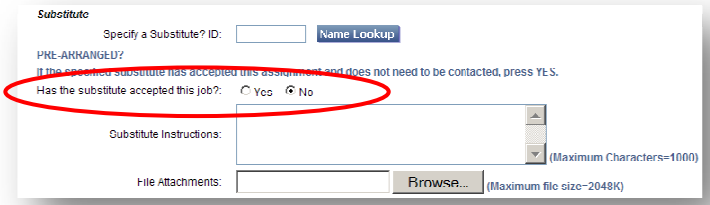
11. To specify a substitute, enter the substitute's ID. If the ID is unknown, click *Name Lookup*.

Uncheck days that do not apply to the vacancy.





12. Click "Yes" to indicate that the substitute is known and has verbally accepted the job from the person reporting the vacancy. The substitute is then responsible for accessing the system, verifying that the vacancy was assigned to them, and obtaining the job number. Click "No" if the substitute has not accepted this assignment.

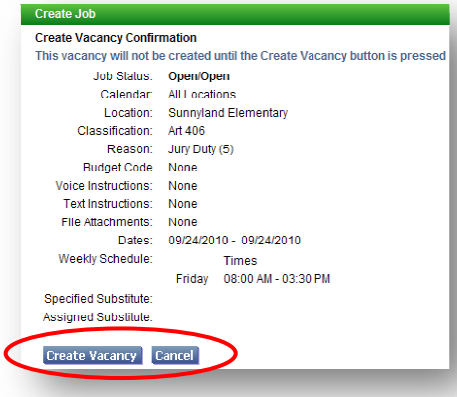


13. Add any instructions you want to provide to the substitute. These instructions will also be voiced to a substitute over the telephone.

14. Attach any files that you want to provide to the substitute or administrator. Up to three attachments can be added.

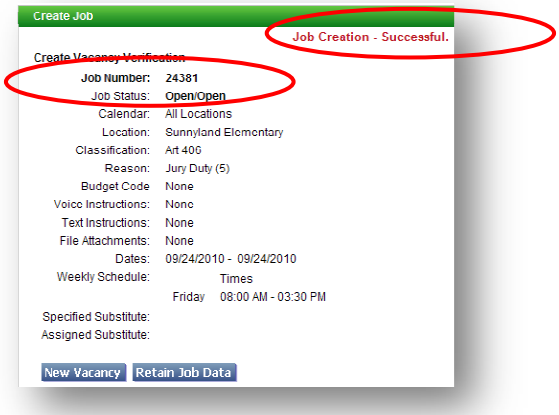
15. Click **Continue** for the next page. If any errors are detected on the form, you will have the opportunity to make corrections.

16. On the Create Vacancy Confirmation page, verify that the absence information is correct and then click **Create Vacancy** to create the job and receive a job number. To modify vacancy information, click Cancel to return to the Create Vacancy form.



17. The Create Vacancy Verification page displays the job number for the vacancy.

18. Click ***Create Vacancy*** to display the Create Vacancy Verification screen. A job number is created for the vacancy.



Daily Job Counts

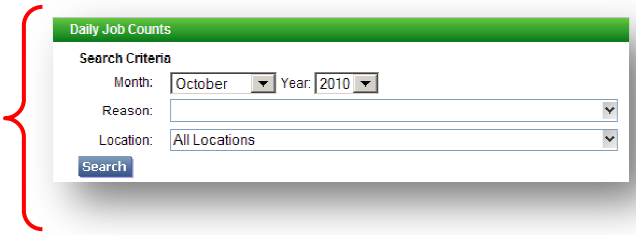
1. Click the **Daily Job Counts** Menu to display the number of jobs per day for a selected reason and location.

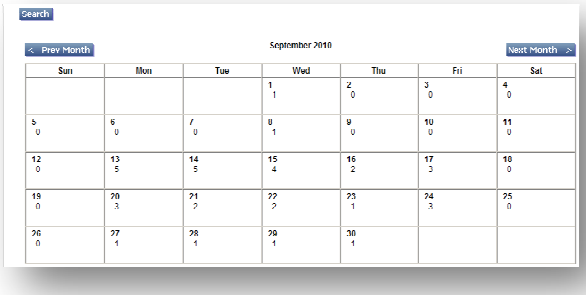
2. Select the Month and Year for the search. Dates can be any date in the past, or up to one year in the future.

3. Select the reason from the list of available reasons. If a reason is not selected, the system displays a job count for all reasons.

4. Select a location from the list of authorized locations/ location groups.

5. Search results display in Calendar format for the current month and year. Use the Next and Previous buttons to scroll to other months.





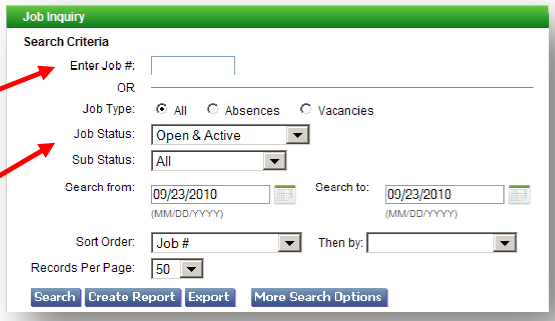
Job Inquiry/Reports

1. Click the **Job Inquiry/Reports** Menu. **Refer to Table A for descriptions of Job Status and Sub Status conditions that can apply to a job.**

2. To search for job information for a specific job, enter the job number.

3. To search on job information for a group of jobs, select the search criteria. Click the More Search Options button to display additional search fields.

4. To display a list of all jobs in the database for today, use the defaults values and click Search.



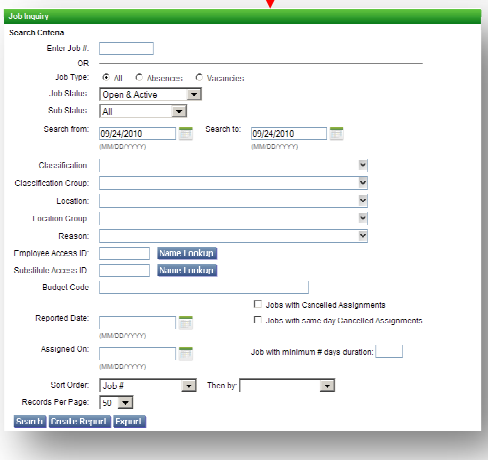
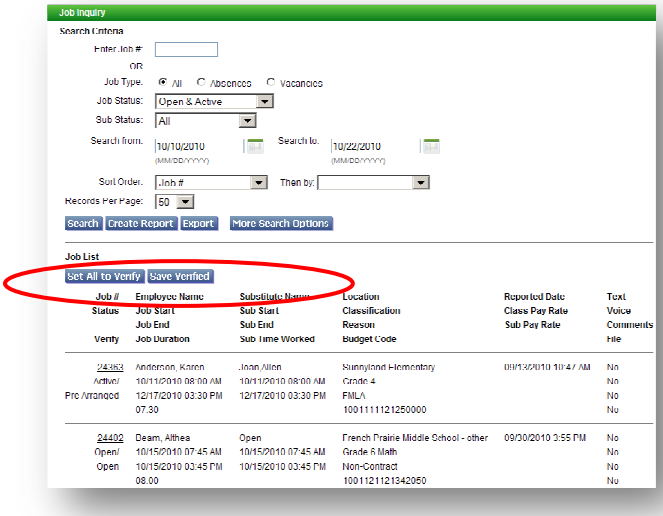


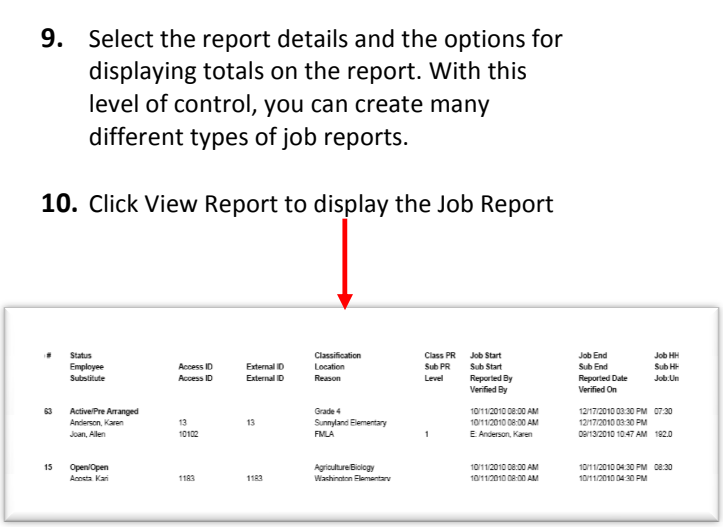
Table A: Job Status and Subsidiary Status Descriptions	
Job Status	**Description**
Open	Jobs that occur today, or in the future, and are not filled.
Active	Jobs that occur today, or in the future and have a substitute assigned.
Finished	Jobs that occurred in the past. A job is "finished" when the end time of the job is reached.
Verified	Job detail information has been confirmed as accurate.
Canceled	Jobs that no longer need to be in the system. Can be past, present, or future jobs.
Stopped	Open jobs that have been stopped for callout.
Subsidiary Status	
Open	Job is not currently being offered to a substitute; awaiting callout; no substitute is assigned.
No Sub Required (NSR)	Substitute not assigned because the days were set up in the calendar as NSR days.
Filled	A substitute has been assigned to the job.
Not Filled	The system has reached the end of the search rule for the classification of the job and no substitute is assigned.
Web Substitute Search	Substitute on the Web searched for available jobs and accepted this job.
IVR Substitute Search	Substitute on the IVR searched for available jobs and accepted this job.
NSR(various)	**NSR – Filled In-House**-Job filled using in-house personnel instead of a substitute. **NSR – Exceeded Substitute Allocation**-Substitute not assigned because the SAUs for the employee's location are met for the period of the absence. **NSR – Minimum Job Days-** Substitute not assigned because the "Minimum Job Days" setting for the employee's classification; the length of the job was not long enough to justify a substitute for this position. **NSR – User Request-**Substitute not assigned because the employee indicated that a substitute is not required for the job. **NSR – No Sub Allowed-** Substitute not assigned because of the "No Sub Allowed" setting for the employee's classification.
Admin Assigned	Job assigned to a substitute from the job modification screen.
IVR - Assigned	Substitute assigned to the job when the IVR called the substitute to offer the job.
IVR – Answering Machine	During callout, the system reached the substitute's answering machine and the job was assigned to the substitute.
Prearranged	Substitute not contacted for the job because a substitute was assigned at job creation.
Automatic Assignment	Job was filled from the Automatic Assignment list for the location of the job.

5. After the search has been performed, the list of jobs matching the search criteria is displayed.
6. To verify the accuracy of finished jobs on the Jobs List, use the Verify buttons (if displayed). Click *Set All to Verify* to place a checkmark in the Verify field of each job. Click *Save Verified* to update each record with a checkmark.
7. To create a report from the search results, click Create Report.
8. The Job Report setup page is displayed.



9. Select the report details and the options for displaying totals on the report. With this level of control, you can create many different types of job reports.

10. Click View Report to display the Job Report

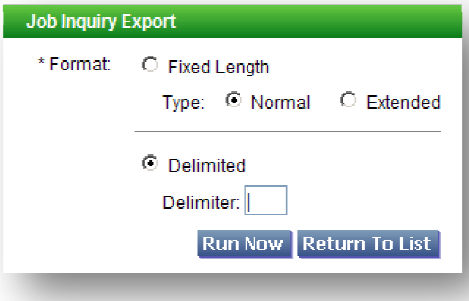


10. To export job data for all jobs on the Job List, click Export on the Job Inquiry page after the job search has been performed. Exported information can be used in other databases or applications.

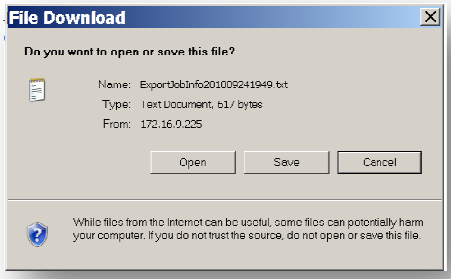
11. The Job Inquiry Export page is displayed.

12. Select the export format and click Run Now.

13. On the File Download page, click Open to display the exported job information in Notepad, or click Save to save the export document as a file.

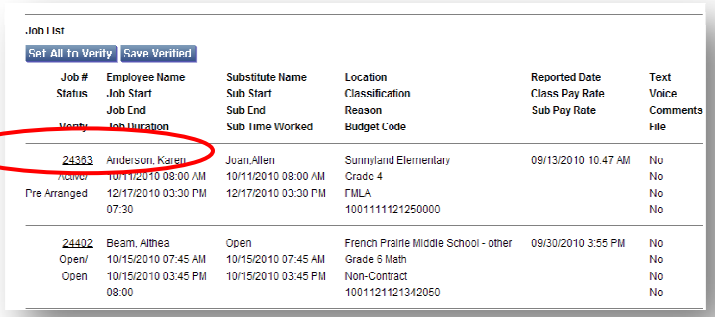


- Fixed Length format applies to SEMS 3.0 formats.
- Delimited refers to SmartFindExpress formats.


File Download
Do you want to open or save this file?
Name: ExportJobInfo20100924194 9.txt
Type: Text Document, 61 bytes
From: 172.16.0.225
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file.

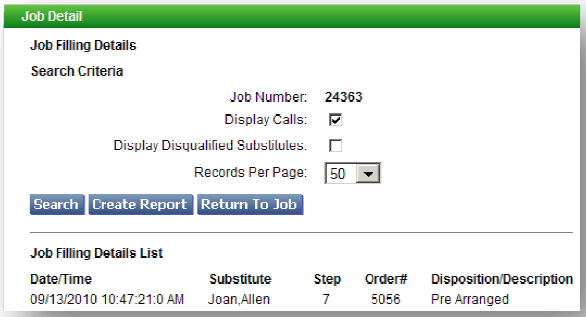
14. **To view/modify job details,** from the Job List, click on the job number of the job you want to review.

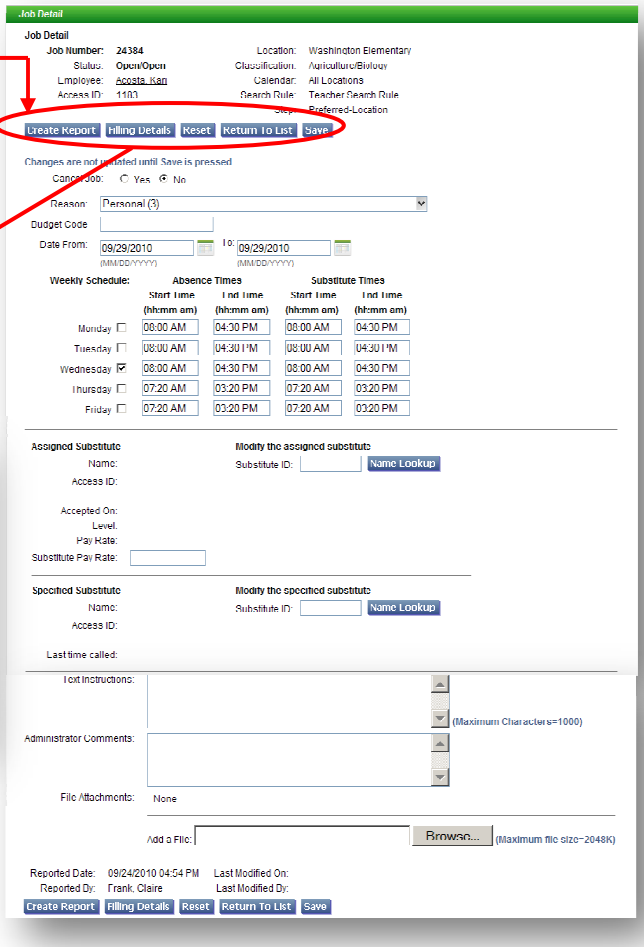
15. The Job Details page is displayed. From the Job Details page, you can view/modify job details; create job detail reports, view job filling details and stop/start callout on a job. The job's status determines the actions that can be performed on the Job Detail page.


Job List
Set All to Verify
Save Verified
Job # / Status / Verify
Employee Name / Job Start / Job End / Job Duration
Substitute Name / Sub Start / Sub End / Sub Time Worked
Location / Classification / Reason / Budget Code
Reported Date / Class Pay Rate / Sub Pay Rate
Text / Voice / Comments / File
24383 Anderson, Karen Active/ Pre Arranged 10/11/2010 08:00 AM 12/17/2010 03:30 PM 07:30
Joan,Allen 10/11/2010 08:00 AM 12/17/2010 03:30 PM
Sunnyland Elementary Grade 4 FMLA 1001111121250000
09/13/2010 10:47 AM
No
24402 Beam, Althea Open/ Open 10/15/2010 07:45 AM 10/15/2010 03:45 PM 08:00
Open 10/15/2010 07:45 AM 10/15/2010 03:45 PM
French Prairie Middle School - other Grade 6 Math Non-Contract 1001121121342050
09/30/2010 3:55 PM

Create Report--
Creates a job detail report for the specified job.

Filling Details--
View the calling information for the job and create Job Filling Details reports.





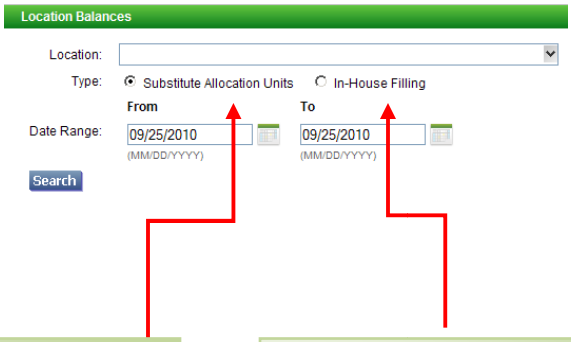
Start Callout--
Displays only if the job has a status of Stopped, Unfilled, or NSR during a callout period.

Stop Callout--
Displays only if the job has a status of Open and is *currently in callout*.

Location Balances

1. Click on **Location Balances** from the Administrator menu.

2. To display a location's remaining SAUs or In-House Filling Capacity balance, choose the location from the Location drop-down menu, select the type of balance to be displayed, specify the date range and click Search.

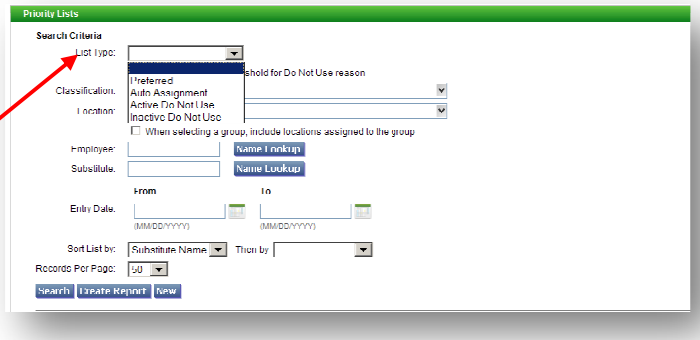


Substitute Allocations Units are the number of absences at a location that may be filled by substitutes during a specific time period. When a location reaches the limit, all additional absences are reported as No Substitute Required - SAU

The In-House Filling capacity is the daily limit a location is assigned for the number of absences to be filled by in-house personnel before a substitute can be assigned.

Priority Lists

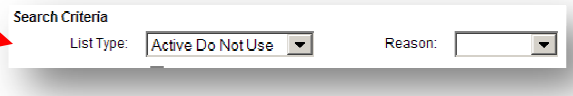
Priority Lists give substitutes preference over other substitutes and determine the order in which jobs are offered via the web, call-in, or call-out. A substitute can be placed on a location, location group, or employee's Preferred list. Priority Lists can be modified and reports can be created.



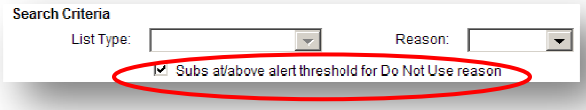
1. Select a list type for the search. **Refer to the following table for Priority List descriptions.**

Type	Description
Do Not Use-Active/Inactive	The Do Not Use list identifies substitutes who should not be offered or assigned jobs at a given location, or for a particular employee. Active lists are used by the system for job processing. Inactive lists are used strictly for historical tracking of Do Not Use entries for a substitute, employee, or location.
Automatic Assignment	Typically used when a location has permanent substitutes who should be assigned before any other substitutes are called. This list can be added or removed from the search rule setup. If a substitute on the list for that location is available, the system assigns that substitute to the job and notifies the absence creator that the job has been assigned from the Automatic Assignment list.
Preferred List	This list identifies substitutes who are preferred for an employee, location, or location group. Preferred lists can have a specific classification or have no classification. Search rules determine the order in which the Preferred lists are used. Typically, priority lists that are classification-specific are checked first to attempt to match classification specific lists with the classification of the job.
Custom	Custom lists can be used to identify substitutes for specific circumstances. Custom lists are created by the operator and inserted into the search rules. Each custom list has a name that is shown in the pull-down list of list types.

2. If the list type selected is Active Do Not Use or Inactive Do Not Use, a Reason field will appear next to the List Type field. Select the reason for the substitute being added to the list.



3. When the "Subs at/above alert threshold for Do Not Use reason" option is enabled, the Reason field will appear. Select the Do Not Use Reason for the search. The system will search for all substitutes currently at the alert threshold limit for the selected reason. Other search fields are disabled.



4. The classification determines the list to which the substitute is assigned.

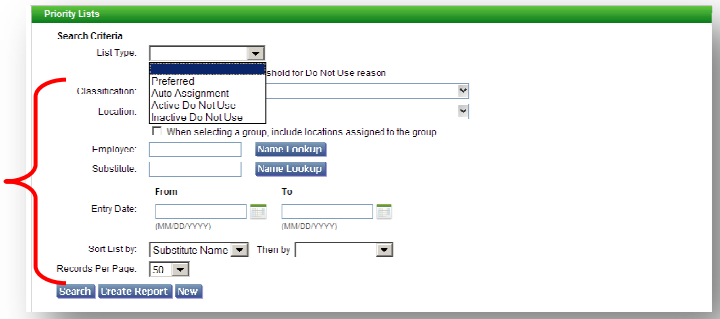
5. The locations in the pull-down menu are the locations found in the administrator's profile.

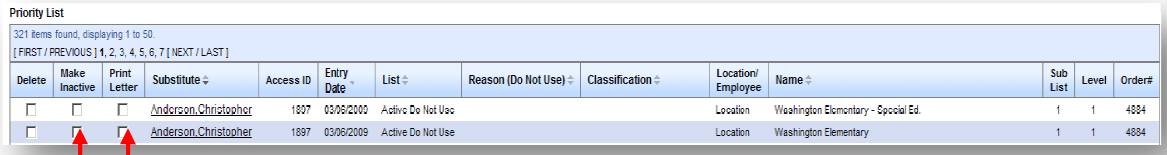
6. Enter the Employee ID or, click *Name Lookup* to search for the employee by name.

7. Enter the Substitute ID or click *Name Lookup* to search for the substitute by name.

8. Enter the date range for when the entry was added to a priority list.

9. Click Search to display the Priority List search results.




Priority List
321 items found, displaying 1 to 50.
[FIRST / PREVIOUS] 1, 2, 3, 4, 5, 6, 7 [NEXT / LAST]
Delete
Make Inactive
Print Letter
Substitute
Access ID
Entry Date
List
Reason (Do Not Use)
Classification
Location/ Employee
Name
Sub List
Level
Order#
Anderson,Christopher 1897 03/06/2000 Active Do Not Use Location Washington Elementary - Special Ed. 1 1 4884
Anderson,Christopher 1897 03/06/2009 Active Do Not Use Location Washington Elementary 1 1 4884

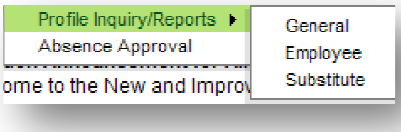
10. To change an Active DNU entry to Inactive, check the Make Inactive box for the entry and then click the Make Inactive button at the button of the screen.

11. To send a notification letter to a substitute to inform them of their entry on an Active Do Not Use list, click the Print Letter box next to the entry and click the Print button at the bottom of the screen. A notification letter can be generated for every Active DNU entry.

Profile Inquiry/Reports

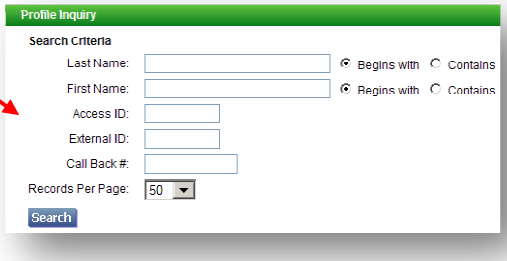
Search for employee and substitute profiles, create reports and export profile information.

1. Click on **Profile Inquiry/Reports** from the Administrator menu. Profile searches can be performed for a single profile or for multiple employee and substitute profiles.



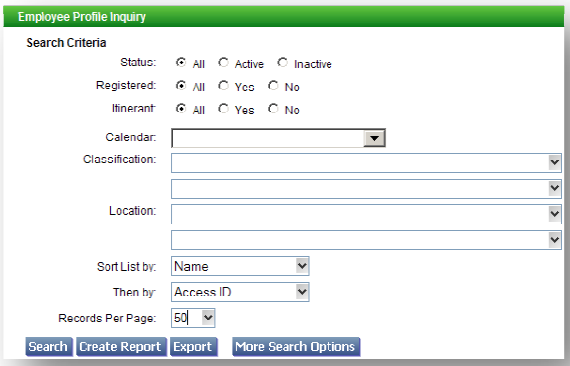
General Profile

1. To search for a specific profile, click the **General** menu option. The Profile Inquiry screen is displayed. Enter the search criteria for the profile and click Search. From the search results, select the profile to view/update.

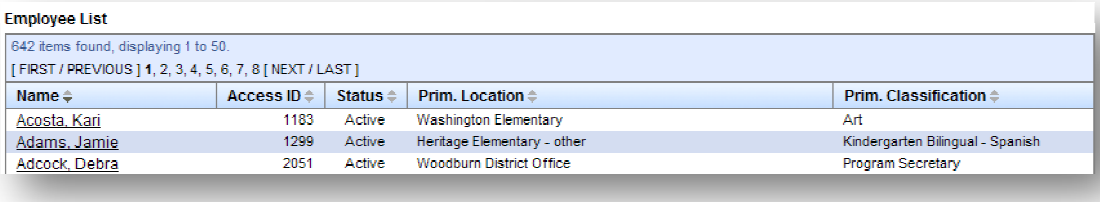


Employee Profile

1. To access information on multiple employees at one time, click the **Employee** menu option. The Employee Profile Inquiry screen is displayed. Enter the search criteria for the profiles and click Search.



2. From the search results, profile information can be viewed and modified. Employee information can be exported and employee reports can be created.



Employee List

642 items found, displaying 1 to 50.

[FIRST / PREVIOUS] **1**, 2, 3, 4, 5, 6, 7, 8 [NEXT / LAST]

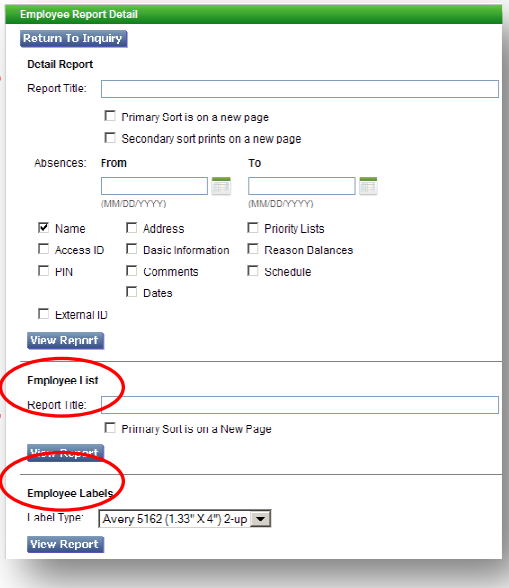
Name	Access ID	Status	Prim. Location	Prim. Classification
Acosta, Kari	1183	Active	Washington Elementary	Art
Adams, Jamie	1299	Active	Heritage Elementary - other	Kindergarten Bilingual - Spanish
Adcock, Debra	2051	Active	Woodburn District Office	Program Secretary

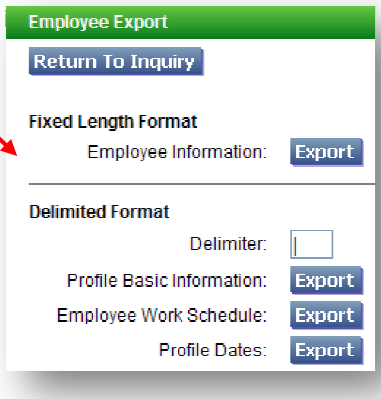
3. To create employee reports, click Create Report to display the Employee Report Detail page. Select the report options for the Detail report and click View Report to display the report.

4. To create an Employee List report for all employees appearing in the search results, click View Report in the Employee List section of the report page.

5. To create an Employee Labels report for all employees appearing in the search results, select the label size from the Label Type drop-down and click View Report.

6. To export employee data, click Export to display the Employee Export screen. Click the Export button next to the data to be exported. The exported file is automatically created as a text file in Notepad.

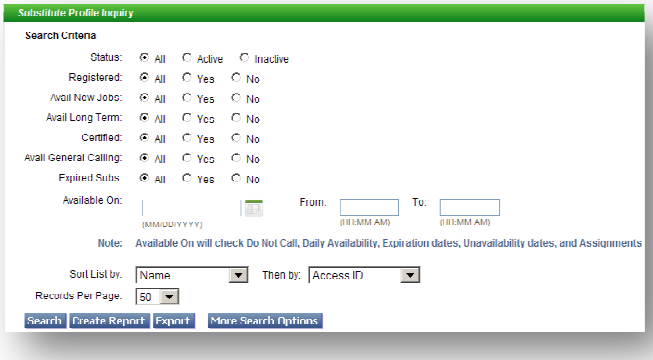




Substitute Profile

1. To access information on multiple substitutes at one time, click the **Substitute** menu option. The Substitute Profile Inquiry screen is displayed. Enter the search criteria for the profiles and click Search.

2. From the search results, profile information can be viewed and modified. Employee information can be exported and employee reports can be created.



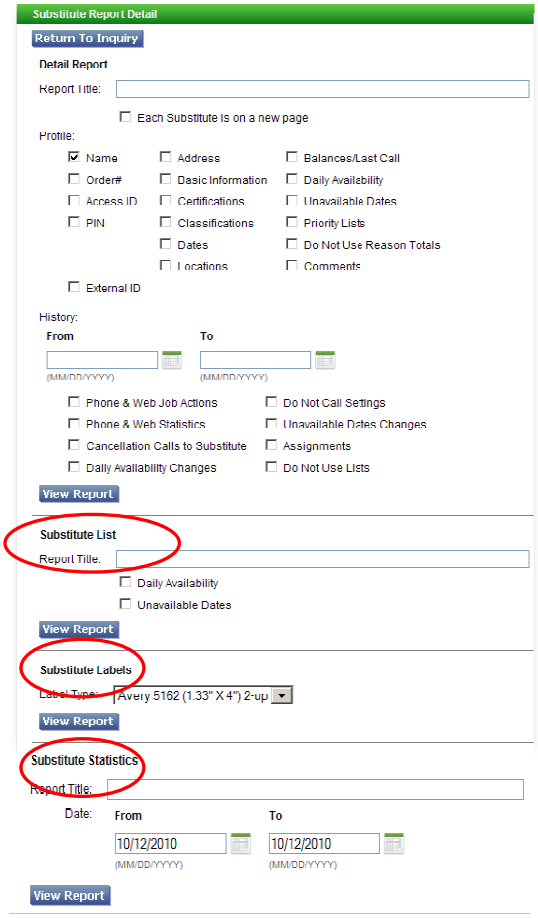
3. To create substitute reports, click Create Report to display the Substitute Report Detail page. Select the report options for the Detail report and click View Report to display the report.

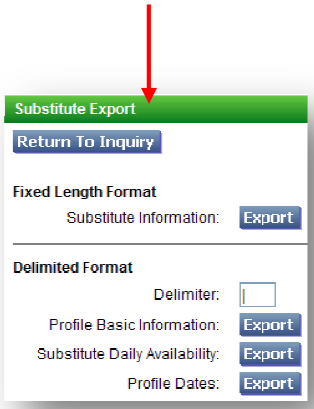
4. To create a Substitute List report for all substitutes appearing in the search results, click View Report in the Substitute List section of the report page.

5. To create a Substitute Labels report for all substitutes appearing in the search results, select the label size from the Label Type drop-down and click View Report.

6. To create a Substitute Statistics report for all substitutes appearing in the search results, enter the date range for the statistics to be displayed and click View Report.

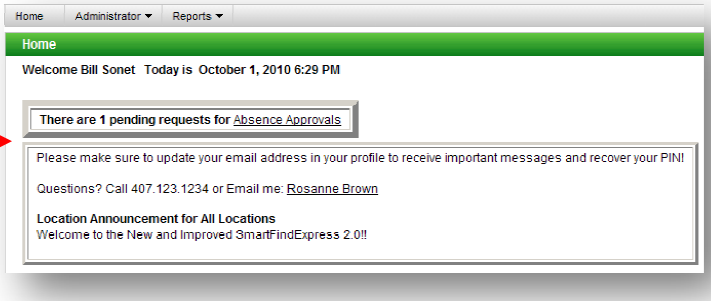
7. To export substitute data, click Export to display the Substitute Export screen. Click the Export button next to the data to be exported. The exported file is automatically created as a text file in Notepad.





Absence Approval (Absence Approval may not be used in your district.)

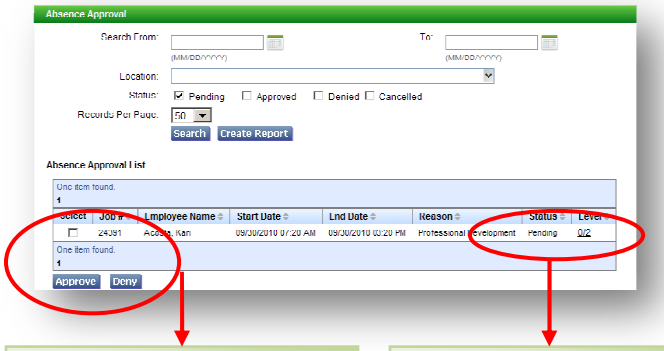
1. To approve/deny pending absence approval requests, click the Absence Approvals link in the notification message on your home page, or select Absence Approval from the Administrator menu.


Home
Administrator
Reports
Home
Welcome Bill Sonet Today is October 1, 2010 6:29 PM
There are 1 pending requests for Absence Approvals
Please make sure to update your email address in your profile to receive important messages and recover your PIN!
Questions? Call 407.123.1234 or Email me: Rosanne Brown
Location Announcement for All Locations
Welcome to the New and Improved SmartFindExpress 2.0!!

2. The Absence Approval List displays all of the absence approval requests in the system that can be approved on your approval level or below.

3. To approve or deny an absence request, click the Select box for the absence request and then click the Approve or Deny button.

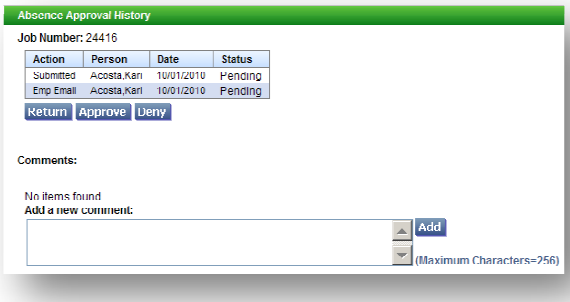
4. To view the history on a request, click the Level link to display the Absence Approval History log for the request. The log shows the history of actions performed on the request (for each level), such as when the request was submitted, emails sent, and request status.



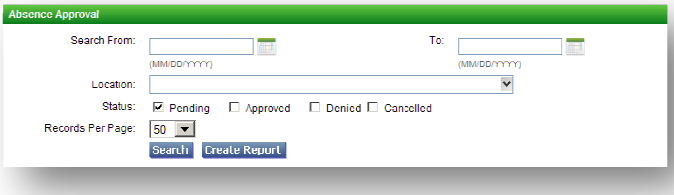
A Select box appears next to the requests that you can approve/deny. Click the Select box and then click either the Approve or Deny button.

Click the Level link to display the history page for the specific absence approval request. View the history, approve/deny the request/ add comments.

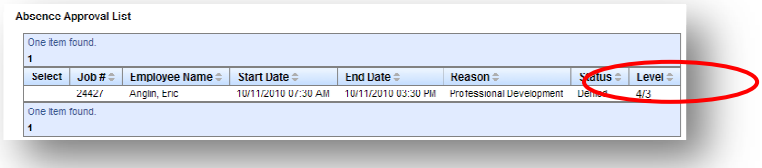
5. To provide any additional information on the absence approval request, enter comments in the Comments box and click Add.



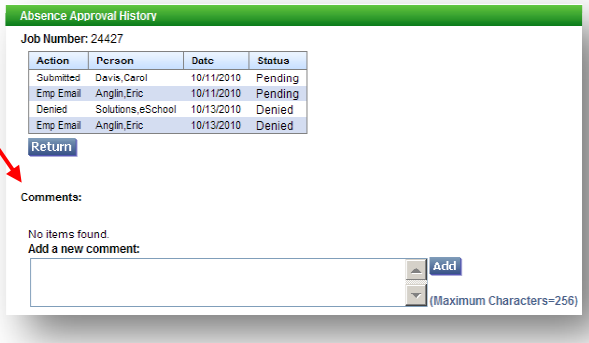
8. To search for existing or future absence approval requests, enter the date range for the search, select the location from the drop-down, and select the status condition(s) for the search.



9. The Absence Approval List displays summary information on the absence requests.

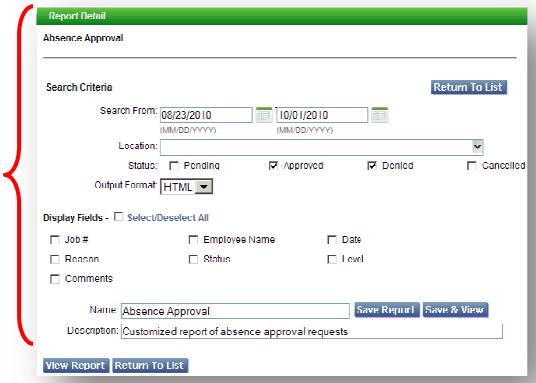


10. Click the Level link to review the history on the absence approval request. Comments may still be added to the request.



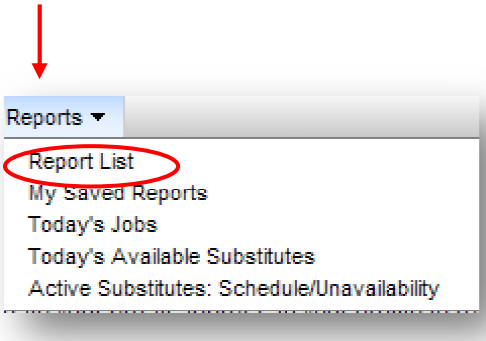
11. To create an Absence Approval Report, click Create Report.

12. On the report detail page, enter the search criteria, choose the output format and select the fields to display on the report. Click View Report to display the report. Click Save Report to save the report to the My Saved Reports" folder, (accessible from the Reports menu). Click Save & View to display and save the report.



Reports

1. Click **Report List** to display the list of available reports in the system.

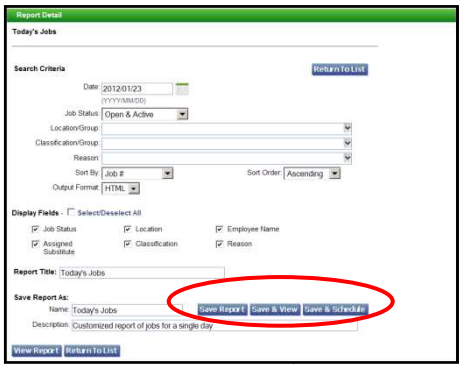


2. Click the link of the report you want to create.

3. The report's setup page is displayed.

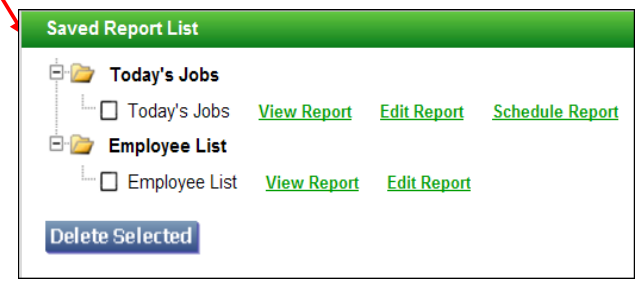
4. Select the search criteria to be used for the report and select the information to display on the report from the Display Fields section of the setup page.

5. After entering the report parameters, click **View Report** to view the report or one of the "Save" options: **Save Report, Save & View or Save & Schedule**. Saved reports display in the "My Saved Reports" folder.



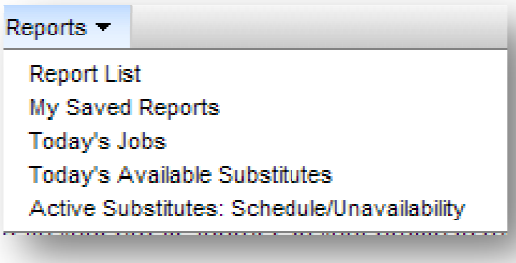
6. To access your saved reports, click the **My Saved Reports** option from the Reports menu. The Saved Report List is displayed.

   - **View Report –** Displays the contents of the report and the export formats.
   - **Edit Report** – Displays the report setup page. Edit the report parameters and rerun the report. Make any changes to the existing search criteria fields and to the display field selections.
   - **Schedule Report** –Displays the Schedule Report page. Reports can be scheduled to run immediately, one time, or on a recurring basis.



7. To generate an on-demand report, click the quick link for the report from the Reports menu.

   - **Today's Jobs -** displays all job information for the administrator's location(s) for a single day.
   - **Today's Available Substitutes -** displays availability information on all substitutes for the current day.
   - **Active Substitutes -** displays schedule and unavailability dates/times for all active substitutes who can accept jobs for the administrator's location(s).



8. The report is automatically generated for your location.

9. To export the report data, click on an export icon at the top of the report page.

10. To apply different filters to the report, and re-run the report, click the Expand Filters link to display the search criteria fields for the report.

11. Enter the new search criteria and click Run Report. The system displays a new version of the report.

Report data can be exported as a PDF, Excel, Word, or CSV file.